

Report Date: 17 Nov 2014

Summary Report for Individual Task

805C-42B-6118

**Administer Interactive Personnel Electronic Records Management System (iPERMS) Personnel and Finance
Records Review Program**

Status: Approved

Distribution Restriction: Approved for public release; distribution is unlimited.

Destruction Notice: None

Foreign Disclosure: FD5 - This product/publication has been reviewed by the product developers in coordination with the Fort Jackson / USASSI foreign disclosure authority. This product is releasable to students from all requesting foreign countries without restrictions.

Condition: You have assumed duties in an S-1 section and are required to conduct the annual personnel and finance records reviews. You have access to the references on the enclosed table and Military Personnel (MILPER) Message 14-046 (New Requirement for Soldiers and Records Managers to Conduct an Annual Review of the iPERMS Personnel And Finance Records), Secretary of the Army Memorandum (Key Supporting Documents Required for Army Military Pay Audit Readiness, 14 June 2013), Military Pay Key Supporting Document Listing (Secretary of the Army Memorandum, June 2013), MILPER Message 13-055 (Soldier Record Accuracy, 26 February 2013), and MILPER Message 13-155 (Implementation Guidance for Secretary of the Army Directive: Key Supporting Documents Required for Army Military Pay Audit Readiness, 21 June 2013). This task should not be trained in MOPP 4.

Standard: Ensure 100% completion of personnel and finance records review during in-processing to a new duty station, annually thereafter, and prior to separation from the Army.

Special Condition: None

Safety Risk: Low

MOPP 4: Never

Task Statements

Cue: You are required to conduct the annual personnel and finance records reviews.

DANGER

None

WARNING

None

CAUTION

None

Remarks: All required references and technical manuals not available online will be provided by the local command.

Notes: None

Performance Steps

1. Identify personnel requiring personnel and finance records reviews.
 - a. Inform subordinate units of personnel requiring reviews.
 - b. Coordinate with companies to schedule personnel for records reviews.
 - c. Initiate records review within iPERMs no earlier than 30 days prior to scheduled appointment.
2. Ensure Soldier provides supporting documentation when conducting records review.
 - a. Review Leave and Earnings Statement (LES), Officer Record Brief (ORB) / Enlisted Record Brief (ERB) and all supporting documentation that substantiates record or pay status.
 - b. Validate review with Common Access Card (CAC) (face-to-face).
3. Conduct personnel records review.
 - a. Review the following:
 - (1) Temporary Change of Station (TCS) / Permanent Change of Station (PCS) / assignment orders and amendments.
 - (2) Additional Skill Identifier (ASI) / Special Qualifications Identifier (SQI) Orders.
 - (3) Promotion Orders.
 - (4) DA Form 330 (Language Proficiency Questionnaire) / Defense Language Proficiency Test (DLPT) documents (as required).
 - (5) Birth Certificate / adoption documents (for dependent children).
 - (6) Marriage Certificate.
 - (7) Divorce Decree.
 - (8) DD Form 93 (Record of Emergency Data) / Servicemembers Group Life Insurance Election (SGLV).
 - (9) Married Army Couples Program (MACP) documents.
 - (10) Military Education Certificates and DA Form 1059s (Academic Evaluation Report).
 - (11) Civilian Transcripts.
 - (12) DA Form 638 (Recommendation for Award) and award certificates / orders, to include unit awards.
 - (13) Skill badge orders.
 - (14) Enlistment contract (DD Form 4 series).
 - (15) Enlistment extension documents.

(16) GI Bill.

(17) DA Form 71 (Oath of Office).

(18) Additional documents, as required (Key Supporting Documents (KSDs))

b. Annotate missing documents and collect copies of supporting documentation for upload to iPERMS.

c. Complete the personnel records review by applying digital signatures for both Soldier and Records Manager.

4. Conduct finance records review.

a. Review the following:

(1) Current PCS / Assignment orders.

(2) Promotion orders for current rank and rank of Record Brief matches grade on the Leave and Earnings Statement (LES).

(3) Basic Allowance for Housing (BAH) entitlement (DD Form 5960, Birth Certificate, Marriage Certificate).

(4) SGLV matches monthly premiums on LES.

(5) Review for special pay (as applicable).

(6) Additional documents, as required (KSDs).

b. Annotate missing documents and collect copies of supporting documentation for upload to iPERMS.

c. Complete the finance records review by applying digital signatures for both Soldier and Records Manager.

5. Review monthly HR Metrics to ensure compliance.

(Asterisks indicates a leader performance step.)

Evaluation Guidance: Score the Soldier GO if all performance measures are passed (P). Score the Soldier NO GO if any performance measure is failed (F). If the Soldier fails any performance measure, show what was done wrong and how to perform it correctly.

Evaluation Preparation: This task can be evaluated by use of the performance measures as listed. This method of evaluation is appropriate if the Soldier performs the task on the job. Allow the Soldier to practice until the Soldier feels qualified and prepared for the evaluation. Then have the Soldier perform the task, using the materials listed in the CONDITIONS statement above. Score the Soldier "PASS" or "FAIL" as determined by the performance.

PERFORMANCE MEASURES	GO	NO-GO	N/A
1. Identified personnel requiring personnel and finance records reviews.			
2. Ensured Soldier provided supporting documentation when conducting records review.			
3. Conducted personnel records review.			
4. Conducted finance records review.			
5. Reviewed monthly HR Metrics to ensure compliance.			

Supporting Reference(s):

Step Number	Reference ID	Reference Name	Required	Primary
	AR 600-8-104 (Revision, April 07, 2014)	Army Military Human Resource Records Management http://www.apd.army.mil/pdf/files/r600_8_104.pdf	Yes	Yes
	EMILPO USERS MANUAL	Electronic Military Personnel Office Users Manual	Yes	No
	EMILPO WEBSITE	Electronic Military Personnel Office Website (https://emilpo.ahrs.army.mil)	Yes	No

Environment: Environmental protection is not just the law but the right thing to do. It is a continual process and starts with deliberate planning. Always be alert to ways to protect our environment during training and missions. In doing so, you will contribute to the sustainment of our training resources while protecting people and the environment from harmful effects. Refer to FM 3-34.5 Environmental Considerations and GTA 05-08-002 ENVIRONMENTAL-RELATED RISK ASSESSMENT.

Safety: In a training environment, leaders must perform a risk assessment in accordance with ATP 5-19, Risk Management. Leaders will complete the current Deliberate Risk Assessment Worksheet in accordance with the TRADOC Safety Officer during the planning and completion of each task and sub-task by assessing mission, enemy, terrain and weather, troops and support available-time available and civil considerations, (METT-TC). Note: During MOPP training, leaders must ensure personnel are monitored for potential heat injury. Local policies and procedures must be followed during times of increased heat category in order to avoid heat related injury. Consider the MOPP work/rest cycles and water replacement guidelines IAW FM 3-11.4, Multiservice Tactics, Techniques, and Procedures for Nuclear, Biological, and Chemical (NBC) Protection, FM 3-11.5, Multiservice Tactics, Techniques, and Procedures for Chemical, Biological, Radiological, and Nuclear Decontamination.

Prerequisite Individual Tasks : None

Supporting Individual Tasks :

Task Number	Title	Proponent	Status
805C-42B-6110	Review Officer Promotions and Selections	805C - Adjutant General (Individual)	Approved
805C-42B-6111	Administer Enlisted Promotions and Selections	805C - Adjutant General (Individual)	Approved
805C-42B-6112	Interpret Military Pay and Allowances	805C - Adjutant General (Individual)	Approved

Supported Individual Tasks : None

Supported Collective Tasks : None